**Benefits Module Enhancements**

A *General Benefits Information* (**infotype 0171**) **record must exist, and be active, for any employee enrolled in benefits.** If the employee does not have this infotype and is enrolled in benefits, they will fail payroll processing.

- Always ensure that you are maintaining the <u>correct</u> employee. You initially select employees for inclusion in the employee list, which is displayed on the left side of the screen throughout processing. From this list, you then select and process individual employees.

    o If you discover that you have selected the wrong employee and are encountering difficulty exiting out of the transaction, type **/n** in the command field and hit enter. This will return you to the SAP Easy Access screen.

The following graphic shows the layout of the screens for individual employee processing:
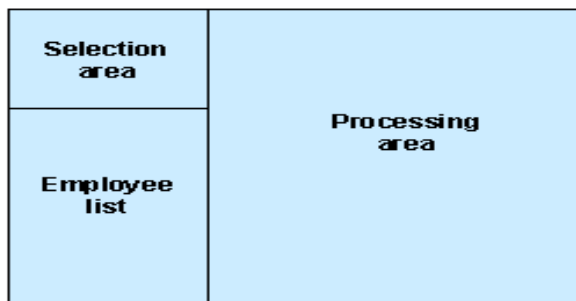
In the **selection area,** you select the employees that you wish to process. The selection technique that you use depends on whether you want to select individual employees or groups of employees:

To select individual employees, enter either the employee number or ID number on the **Direct selection** tab and then click
.
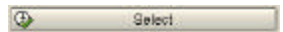
To select a group of employees, enter the appropriate grouping(s) on the **Selection set** tab. Click to add your selection to the **employee list** or to replace the contents of an existing list with this selection. The **employee list** can also be sorted filtered, or deleted, as required.

To process an employee, single click on the appropriate entry in the employee list. The relevant data for the selected employee is automatically displayed in the **processing area**.


Note: The employee list is stored in the ABAP Shared Memory and usually remains available throughout your work session. If the memory reaches its maximum capacity or is refreshed, however, you will need to regenerate the list.

Enrollment

1. Single-click on the relevant employee.

   A list of possible offers is displayed with the corresponding validity period.
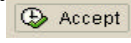
2. To generate an offer, double-click on an offer or select the offer and click
   [🗋 Get offer].
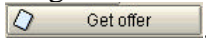
   A list of the plans for which the employee can enroll appears, structured according to plan type. For each plan, the status and enrollment validity period are shown.
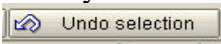
   You can generate an offer for a different participation start date by clicking 🗓, changing the date, and reselecting the offer.

3. Single-click on a plan to select it for enrollment or to make changes.

   Default enrollment data is displayed. Make any necessary changes to this data in accordance with the employee's wishes. Click [⊕ Accept] to confirm your selections.
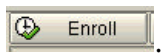
   Once your selections are complete, the plan is marked with a green check to indicate that it is selected.

4. Once you have entered the employee's elections for all plans, check whether you have selected the correct plans.

   To deselect a plan for which you do not want to complete enrollment, put the cursor on the plan line and click [⬑ Undo selection].

5. If you are satisfied with the plan selections, click [⊕ Enroll].

   A list of actions that will be performed by the system is displayed for you to confirm.

6. If you are satisfied with the actions that the system will perform, click [⊕ Enroll].

Result

The employee is enrolled and you can print a confirmation form by performing the Create Confirmation Form transaction.
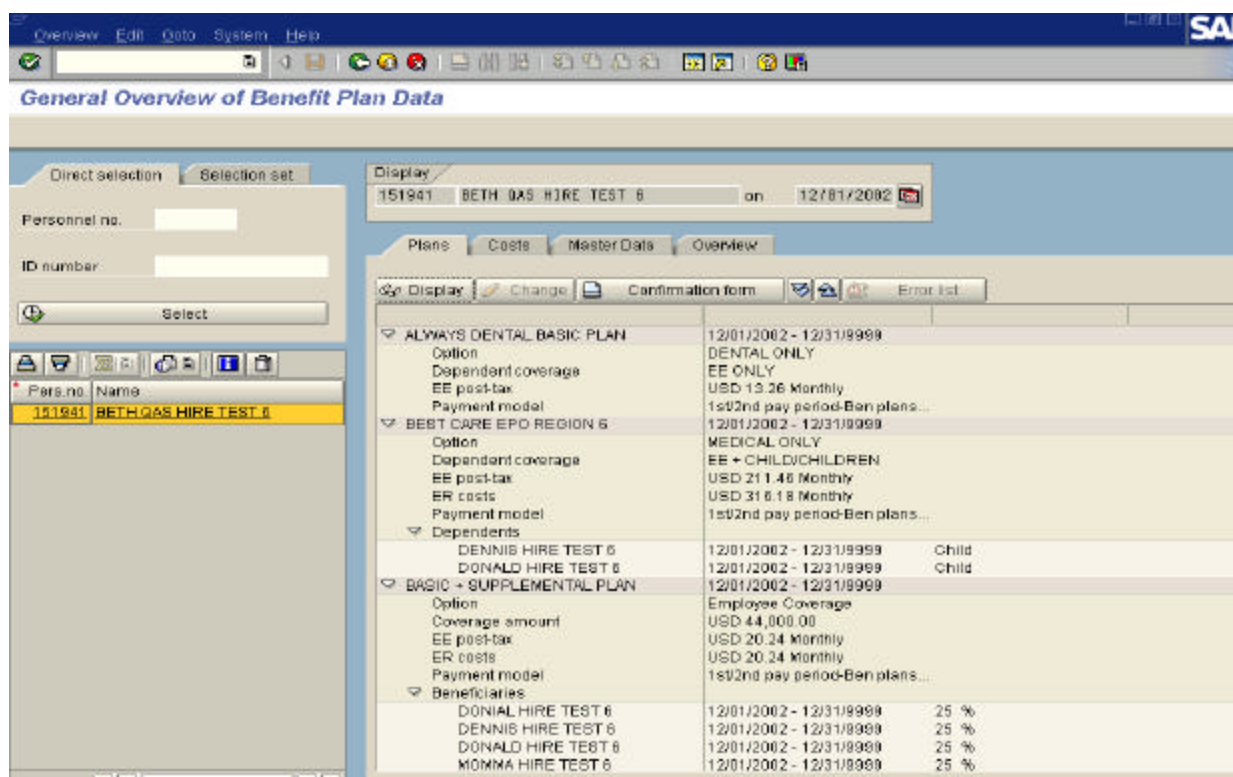
Hint: Clicking [👤 Overview] on the Enrollment screen *displays* the General Overview of Benefit Plan Data screen for the selected employee.

Participation Overview (HRBEN0006)

This function allows you to display information about the benefits of individual employees. You would use this function, for example, if you receive an inquiry from an employee regarding their current enrollments.

1. Choose *Human Resources* ? *Personnel Management* ? *Benefits* ? *Participation Overview*.

2. Select the employees for whom you wish to display an overview. Click 🔲 to change the system default date and overview for a different period of time.

3. Single -click on the relevant employee.

A series of tabs appears, showing the different categories of information available.

Plans Displays selected options, dependents/beneficiaries, monthly costs, employee and employer contributions. If you highlight a plan and then click the display icon, the system takes you to the master data Display 'Infotype' screen for that plan.

Costs Displays employee and employer costs. The benefit period for calculations defaults as Bi-weekly. You may select Semi-monthly to view the employee and employer semi-monthly costs/percentages for the benefit plans. Click 'Expand all' to display the costs for each plan.

Master Data Displays a summary of relevant employee data. Source of this data includes *Personal Data* (0002), *General Benefits Information* (0171), *Organizational Assignment* (0001), and *Family/Related Person* (0021).

It is not suggested that you do <u>not</u> utilize the [→ Maintain pers. master data] option to change employee master data unless directed to do so in on-line help. If utilized incorrectly, this could result in data inconsistencies.

Overview Displays a participation time line. If necessary, change the **Start date** and **End date** to reflect the time period you wish to display.   You can display the actual infotype by double-clicking the specific plan you wish to see.

Monitor Benefits Eligibility (HRBEN0003)

During enrollment processing, the system offers only those plans for enrollment for which employees are eligible. It also performs extensive checks to ensure that the employee plan elections are consistent with the setup of plans and flexible administration settings. After enrollment, however, inconsistencies in plan participation can occur as a result of the following:

- **Changes in an employee's organizational assignment**

  If an employee falls into a different grouping for any plan-related or administrative settings, she may become ineligible for the plans in which she is currently participating.

- **Manual adjustments made directly on infotype records**

  Although the system does not prevent you from changing employee elections directly on plan infotypes, if done in this manner, inconsistencies can result. You must use the appropriate Enrollment/Maintain Adjustment Reason transaction to make changes to benefit plans infotypes, except where specifically stated in the online help to do otherwise.

The **Participation Monitor** enables you to detect employees who are no longer eligible for plans in which they are participating and find any inconsistencies in plan elections. For example, when the employee has a dependent child between the ages of 21 and 24 covered by a benefit plan, the child must be a full-time student for continuation of coverage. When the student verification is done the Student checkbox is selected on the Family/Related Person infotype. If the checkbox is

not selected for this dependent child age group the employee along with the affected dependent child will be included in the output of this transaction.

We recommend that you run the **Participation Monitor** regularly to detect ineligibility and election inconsistencies as soon as they occur. If you must print the output, you will have to execute the transaction in background. Refer to http://osisike.doa.state.la.us:5050/state.asp?task=Introduction_to_ISIS_HR_Reporting for more information on Background Processing.

Terminating Enrollments

General Benefits Information (Infotype 0171) must exist for the entire period the employee is enrolled in benefits plans. During the **Separation** and **Transfer NP-P** actions, on the Change Benefits Information screen leave the **To** date as 12/31/9999.

1. Follow the appropriate action or maintain adjustment reason transaction to get to the Termination of Plan Participation screen.

2. Select employees for processing.

3. Single-click on the relevant employee.

    A list of the plan types in which the employee is enrolled is displayed with the corresponding validity period.

4. Select the plan type(s) that you wish to terminate.

    The default termination date is displayed next to each plan. This date is based on the system date and is dependent on the termination rules assigned.

    If you want the termination dates for all plans to be based on a different system date, you can change the system date by clicking 🗓.

5. Click [End participation] to terminate participation in the selected plans.

    A dialog box appears showing the plan types that will be terminated. To continue, click [Stop participation].
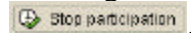
Result

The system delimits the appropriate plan infotypes, taking into account any coverage continuation period defined in a termination rule for the plan.